

CONDUCTING VIRTUAL CLASSES

Preparing to conduct a virtual PTC class requires that you use skills that are in addition to those needed for an in-person class. The following tips will help ensure success when offering PTC virtually.

General

Outreach, general participant registration and leader roles are mostly unchanged with virtual classes. If three rather than the required two leaders will be facilitating the 6-week class series, all three should be present for the classes.

Promotional materials for a virtual class should include technology requirements: computer or large tablet with microphone, camera, and reliable internet connection. Because the class is interactive, cell phones and small tablets provide a less satisfactory experience since the number of participants who can be seen at one time is very limited.

The virtual PTC class series is designed for 8-10 caregivers, with a maximum of 12. Even when using a computer monitor or large tablet, having more than this number, plus two leaders, will make it difficult for everyone to see each other. It's also important that there be enough time for caregivers to interact with one another during virtual classes to both give and receive support. If a class is too large, the time for group interaction is diminished, if the class is too small, the group interaction and learning that comes from giving and receiving feedback is lessened.

Registration is the appropriate time to verify that caregivers have the required technology to participate in an online class: If a caregiver will be connecting to the classes via a personal hot spot from their cell phone, inform them that virtual meeting software uses a considerable amount of data, and that an unlimited data plan is recommended to avoid unexpected charges.

Select software for virtual class

You and your co-leaders need to select software for conducting a virtual meeting. Ideally, it should include a feature to separate class participants into smaller groups. Depending upon the software, these might be called breakout rooms or separate group conversations.

Some popular examples of meeting software include: Adobe Connect, GoToMeeting, RingCentral, Skype, VSee, WebEx, Zoom, etc.

Prices vary. Your organization may already have a subscription. In some cases, the breakout room feature might only be available with a different subscription level. For example, breakout rooms are not available with basic Skype, but are included with Skype for Business (Microsoft Teams).

The tips that follow are based primarily upon our experiences with the Zoom platform.

Practice using selected software

Most virtual software companies offer instructional videos to help users gain the skills needed during a virtual meeting. We recommend you watch tutorials for the selected software and practice with co-leaders until comfortable using the software.

Generally, the meeting host is the person who has access to the virtual meeting software account. Usually this is one of the class leaders, although it could be a designated individual with the organization sponsoring the classes.

Consult tutorials for your selected software to determine which tasks are reserved for action by the host and/or co-host of the meeting. Some tasks can only be performed by the host; others can be done by either the host or an assigned co-host.

Host tasks – one time only

Depending upon your software, some virtual meeting features must first be activated in the account settings before they can be used when scheduling meetings. This is generally a one-time task, although they can be changed as necessary.

For Zoom, the following must be turned on in Settings. To access all Settings, you must log into your account at zoom.us via a web browser, and not through the desktop app. Check each Settings section:

- ***Security***
 - Setting a passcode to enter the meeting is optional.
 - Waiting room is selected by default.
- ***Schedule Meeting***
 - Select Host video and Participants video on when the meeting starts, and Mute participants upon entry.
 - Do not allow Join before host.
- ***In Meeting (Basic)***
 - Select Chat, Co-host so host can assign a co-host, Screen sharing (host only), and Allow participants to rename themselves.
- ***In Meeting((Advanced)***
 - Select Breakout room and Virtual background (but not video backgrounds).

Host only tasks

In Zoom, only the host can perform the following tasks:

- Schedule meetings in the virtual meeting software for caregiver software orientation and 6-week class
 - Schedule the 6-week class is as a recurring meeting. When scheduled this way, all six classes have the same Zoom link.

- Log into your account at Zoom.us via your web browser (or schedule via email, if integrated) and go to Schedule a Meeting. After entering the date and start time for the first of the weekly classes, enter the time when the meeting will start (you can log in earlier), and select the length of time for the meeting, for example, 1 hr 30 min for the 90-minute class.
- Select Recurring meeting, and then Weekly, Every 1 week, the day of the week, and either the date of the last class or after 6 occurrences.
- If you want the additional security of a passcode, you can enter it at this time. Waiting room should be enabled by default.
- Copy invitation link and invitation so it can be emailed to co-leaders and class participants
 - After creating and saving classes that you have scheduled, the next screen has the Invite Link and button to Copy Invitation. Copy the invitation into your email program to send to each participant, along with any additional details. For recurring meetings, the invitation lists all the dates of the class series.
 - If Zoom has been integrated with your email program, such as Outlook, do not use the email program's meeting invitation to send the link. Caregivers are more likely to be using a web browser email program, for example, Yahoo or Gmail, and this simply doesn't work. Send the link by direct email.
 - For recurring meetings, the invitation lists all the dates.
- Place class participants or co-leaders into Breakout rooms and return them to group
 - During a meeting, only the host manages this feature. During the 6-week class, allowing the software to randomly assign participants to a Breakout room is quickest. Zoom knows how many participants are in the meeting (excluding host) and will ask

you to specify the number of Breakout rooms to create. When working with this feature, if there is an odd number of participants, pair the extra person with the co-leader.

- There is an option to assign a specific time length to a Breakout room session, or you can manually end the Breakout room and bring everyone back to the main room. As the host, you can also broadcast a message into the Breakout room, for example, during a paired activity that lasts 10 minutes, at 5 minutes, you can broadcast a reminder for them to switch who is sharing.
- Host starts and ends the virtual meeting
 - Can log in any time prior to the start time and stay virtual afterwards.
 - Immediately assign at least one co-host (usually the co-leader). Co-hosts have the same access to most in-meeting controls as host, and can take over the meeting in case the host loses connection or has to leave the meeting for an emergency. Note that the host losing connection does not end the meeting.

Other host tasks

The host and co-host will need to complete these tasks for each class. When necessary, these are explained more completely in the **Software orientation with class participants** section that follows.

- Use Waiting room feature, if available
 - As a security precaution, Zoom requires the Waiting room.
- Admit class participants into the virtual training session
 - See “Logistics during weekly classes”, page 11 for details
- See list of all participants

- Clicking on the Participants button at the bottom of the Zoom window brings up a fly out window with all the participants. By also clicking on chat, the chat window appears below the list of participants. Some leaders find it easier to monitor raised hands and chats from this window.
- Use chat feature, both privately and to everyone
- Lower “raise hand”, available only to participants during the meeting
- Access and play video and audio files on PTC website
 - See “Using class materials virtually”, page 9
- Share screen when using video and PowerPoint files and enter text in PowerPoint tables
 - See “Using PowerPoint Virtually”, page 14
- Understand different ways to view the meeting
 - Full screen or not? When facilitating, do not use full screen so you can have both Zoom and PowerPoint visible to keep slides advanced.
 - Speaker vs Gallery? To help create a feeling that one is in a group class, always use Gallery view. If you see the Speaker button, you are correctly in Gallery view.
 - Select Side-by-Side during Screen share, and adjust the relative sizes of Gallery and Screen share so the most participants can be seen at one time. To see everyone, the leader who is screen sharing can resize the floating Gallery window by first selecting grid from top of the window and then clicking and dragging diagonally from a corner of the Gallery window.
- Know what to do if someone loses connection to the meeting

- If someone loses, connection, logging back in generally is sufficient. Watch for a missing participant to reappear in the Waiting room so they can be readmitted to the class.
- If the event someone is unable to rejoin the meeting due to technical difficulties or an unanticipated situation, they should contact the leader as soon as possible. We provide participants with the cell phone number of the leaders during the first class and ask them to send a text (preferable) or call and leave a message. Depending upon your facility, you can provide another number where leaders can be quickly reached.

Software orientation with class participants

To ensure the most positive virtual experience for everyone involved, it is important that participants understand how to use the meeting software. Holding a group orientation session or making individual calls during the week before the class begins allows you to confirm that caregivers understand how to use the virtual meeting software. It also gives time to trouble-shoot any issues. The Confirmation Letter/email sent to class participants should include a link to both the orientation and the classes.

During the group orientation or individual calls, confirm class participants know how to:

- Log into meeting using link in the email invitation from leaders
 - The first time Zoom is used, it must download and install an application on the participant's computer.
- Understand Waiting room feature
 - As a Zoom security feature, all participants remain in the Waiting room until the host or co-host admits them into the main room.
- Turn video on and position their camera so they are easily seen, plus discuss importance of keeping video on during entire class

- During an in-person class, everyone is able to see each other at all times. During a virtual class, the only way to recreate a feeling of being in the class together is for everyone to keep their video turned on at all times.
- Rename themselves so everyone can see each other's first names
 - With Zoom, if participants click on the dots to the right of how they are identified by the software, they can change that to their first name. This can be done from either the thumbnail window or from the list of participants. First names are much friendlier and more confidential.
- Mute/unmute microphone, plus discuss importance of remaining muted when not talking to avoid interference from background noises
- Adjust audio volume on their computer using either the computer's or the meeting software's controls
- Use chat feature, both privately and to everyone, but not for brainstorming
- Use "Raise hand" feature and lower it after speaking
- Select Gallery view, and adjust it in order to see everyone, plus discuss importance of staying in Gallery view so software doesn't switch to the active speaker and the view of audio-visuals is the largest
 - In Zoom, if you see a button for Speaker view, that means you are in Gallery view, where you want to be. Clicking the button selects the opposite view.
 - Select View Options, then Side-by-Side to maximize the ability to see everyone. Once Side-by-Side view is selected, whenever someone is using screen share, there is an almost invisible slider between the Gallery and the screen share section. If you hover the

mouse cursor over the left side of the Gallery and slowly move it to the left, the slider will highlight as a vertical white line. Then click and hold the mouse and drag the slider to the left or right to change the relative sizes of the screen share and the Gallery. It may take some practice to do this correctly. This step will need to be repeated whenever one returns from a Breakout room. This feature is not available with small tablets such as an iPad and cell phones.

- Enter and leave Breakout rooms, if available
 - In Zoom, once the host has created the Breakout rooms, there may be a brief delay while Zoom creates the rooms. Then everyone must click the Join breakout button in the pop up window to join the room. The host will either allow the software to automatically return participants to the main room after a preset time or manually return them by ending the breakouts. If a time was set, Zoom will broadcast a 1 minute text warning that the breakouts are ending. The host can also broadcast a text message into the Breakout rooms. To return to the main room on your own, click the button in the lower right corner of the Breakout window to leave the breakout room. Do NOT select leave the meeting!
- Come back into the class if they lose connection
 - Participants should always try to log back into the meeting as the first step, and be readmitted from the Waiting room. If this doesn't work, assuming one has an internet connection, restart the computer, and try again. If still unsuccessful, contact the class leader, following the instructions provided.

Using class materials virtually

- The participant handouts from all six weekly sessions have been compiled into a single handouts file available through the Dropbox link from PTC Headquarters. This PDF document can either be

emailed to caregivers prior to the start of the class series, or it can be printed and mailed to them. We recommend that they print the entire document.

- Create a general “Local Resources” handout in place of a resource table. Edit it as needed after Class 1 if a resource needs to be added based upon caregiver needs. Email this handout after Class 1 or with the Class 2 email reminder and link.
- The current scripts have **not** yet been revised for virtual delivery. (NOTE: The 2021 versions will be more digital friendly.) You will sometimes need to paraphrase instructions to accommodate the differences between in-person and virtual classes. We recommend that you review the scripts prior to each class and make notes about any changes in what you will say.
- Only digital visual aids are used in virtual classes: “*I Am a Caregiver*” video and guided imagery relaxation from the PTC website, and PowerPoint slides that include tables for recording brainstorming and other input from participants. These should be cued up and minimized on your computer before the start of the class in which they will be used. Be sure the meeting software audio is set to use the computer audio.
 - See “Using PowerPoint Virtually” on page 14 for additional tips.
 - If your meeting software does not allow live streaming, ask participants to watch the “I Am a Caregiver” video prior to Class 1. We recommend that your email with the video link includes the two “Questions to Consider” from the class PowerPoint so participants know what to watch for and are prepared for the class activity. When live streaming is not an option, you can read the guided mediation(s) from the script.

Logistics for weekly classes

- A day or two prior to each weekly class, we recommend that you send an email reminder with the link to the virtual class. This is especially important if the link to the orientation is different than the weekly classes.
- Plan to join the virtual meeting at least 15-20 minutes prior to start time.
 - As soon as the host leader has admitted the co-leader from the Waiting room into the meeting, the host should assign the role of co-host to the co-leader.
 - Cue up all audio-visuals being used in the class and minimize until selected for Screen share.
- Decide when you will allow participants to join the meeting from the Waiting room, for example, 5-10 minutes prior to the start time. Having a few minutes of social conversation (which can include a fun ice breaker) helps create a welcoming environment.
- Make sure everyone has positioned their cameras so their faces are easy to see and their individual thumbnails are labeled with first names.
- If your organization has the capacity for a technical support person available to call people experiencing difficulties, it eliminates the need for one leader to do this while the other is facilitating.
- Teamwork between co-leaders helps ensure everyone is acknowledged in a timely manner.
 - At all times, watch for chats, missing or unmuted participants, and raised hands, both digital and physical. If caregivers forget to mute themselves or lower digital raised hands after speaking, one of the leaders can do it as soon as it is noticed.

Facilitation tips

- Facilitate the workshop just as you would during an in-person class (facilitating all activities completely, modeling, managing group dynamics, etc.).
- Be sure to allow extra time for silence when you ask ONE question at a time as individuals may experience a time delay depending upon their internet connection.
- For brainstorming and problem-solving, you can ask caregivers to, use the “raised hand” feature or physically raise hands. Let the group know which you prefer. Do not use the chat feature for brainstorms.
 - The “raise hand” feature helps track who is ready to share by showing on both on the participant window and the fly out list of participants. Then the class leader can invite one caregiver at a time to speak. This helps caregivers know when to unmute their microphone, share, and re-mute their microphone. Physically raising hands is another option. Different class leaders may have preferences for one or more methods. It is important to communicate these preferences with the class.
- Look for opportunities in the script for when you do not need to share your PowerPoint screen for charts and brainstorms. This allows everyone to see each other more easily. Placing sticky notes in your script to “stop share screen” and “start share screen” can help remind you.
- It is also helpful to add sticky notes to the script to indicate which co-leader will control the PowerPoint slides to screen share and/or enter text in the brainstorm tables. For example, “Sally scribes” or “Jill screen shares”.
- Use breakout rooms for pairs activities. If this isn’t possible, instead of “pair and share,” have caregivers report for themselves. Be sure to model this.

- Learning to speak directly to the camera—as opposed to looking up or down, at a participant window or yourself—will help create the feeling that you are connecting with everyone. For example, instead of looking down at the script notebook, remove the script pages and hold them higher in front of you while speaking, yet without them being visible on camera.

We recommend that you experiment with camera and script placement and practice this skill with your co-leader. You and your co-leader can provide feedback to each other so you can continue to make adjustments.

Some other options for managing the script and computer running Zoom and PowerPoint include using dual monitors, or reading the script from a tablet.

Participant safety and confidentiality

- As with an in-person class, watch for signs/symptoms of depression, suicidal ideation and abuse. Refer caregivers to resources (211, local ADRC, etc.) available as for support these concerns.
- Protect the confidentiality of caregivers just as you would for an in-person workshop.
 - Do not record workshop sessions. Be sure the record option is not selected in your virtual meeting software.
 - Do not allow guests. This includes the care receiver if the caregiver is participating from home. Having a respite companion for the care receiver and their engagement in another activity allows the caregiver to participate in the class and let go of caregiving responsibilities during this time.
 - Pets are allowed!

USING POWERPOINT VIRTUALLY

Teaching with PowerPoint slides

When teaching virtually, follow these guidelines:

- During the planning process, decide how to share PowerPoint responsibilities. If one leader is facilitating a tool, the other one can share screen, advance slides and enter text for brainstorming activities.

We do not recommend using the “remote control” feature in which one leader gives control of PowerPoint on their computer to the other leader. There are multiple issues with this feature that are best avoided by simply not using it.

- Use the mouse cursor to point to items on a slide or a pointer tool available in your virtual meeting software.

Using slides for brainstorming

Brainstorm slides have tables for entering the responses from class participants. The leader managing the slides can move from field to field in the table by placing the mouse cursor in a field, using the tab key, or by using the arrow keys. You can change the font size in a table, if needed. Pressing Tab in the last cell of the table will add an additional row.

When using PowerPoint, you can either be in Design mode, where slides are created and edited, or Slide Show mode, which fills the entire screen and does not allow for slide editing. To enter text on slides, you **MUST** remain in Design mode, which is not how one generally uses PowerPoint during presentations.

To provide the cleanest appearance and make the slide size the largest, complete these steps **BEFORE** showing slides during in-person classes or sharing your screen during virtual classes.

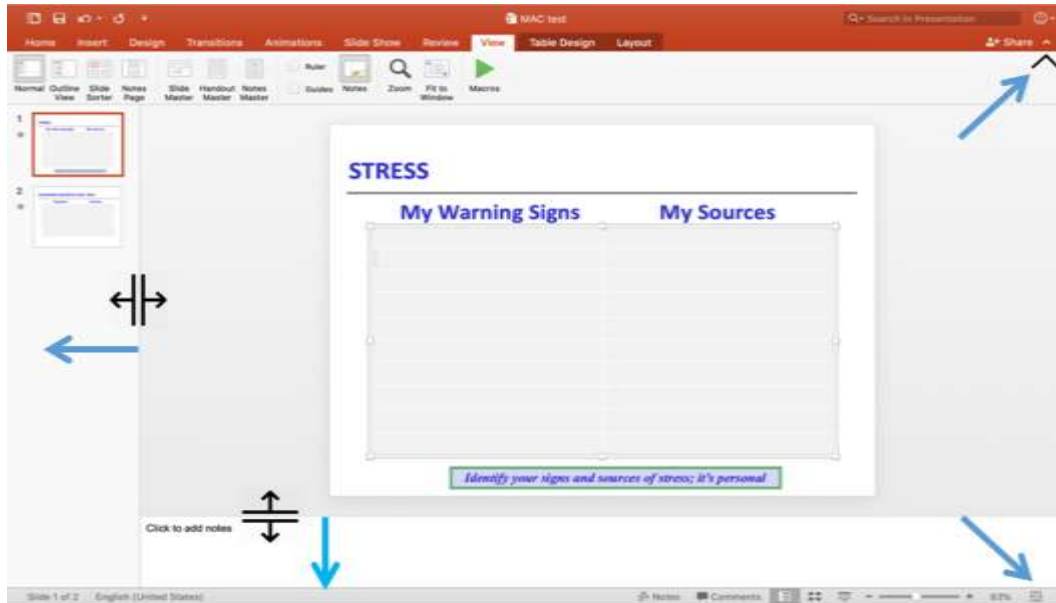
To maximize the size of the slide, see the screen shots on page 16 and follow these steps:

- Minimize ribbon along top (upper right arrow).
- Minimize the slide thumbnail panel on left side of screen. (Select “Normal” on View tab to restore thumbnails.)
- Minimize size of notes panel at bottom.
- Click “fit slide to current window” icon beside zoom slider (lower right arrow).
- Now you are ready to enter text in table fields.

Recommendation: During classes, use a COPY of the PowerPoint file to preserve the original. If you save a presentation, it will save all the all the text that you entered. To preserve confidentiality, you don’t want to do this.

If you inadvertently saved the presentation, don’t have an original copy, and need to restore the blank tables, view the presentation in Design (editing) mode, select and delete the new text without deleting the table, then resave the presentation.

Normal view - with steps to maximize slide size



View after maximizing slide size



To restore PowerPoint to Normal view, click on the View tab and select Normal, the icon on the far left.